Human Centered Evaluation

Max Schorr, GOOD Magazine Tatyana Mamut, IDEOAaron Sklar, IDEO David Bonbright, Keystone
Jamey Power, Former Sr. VP of JDPower & Associates

Purpose

Social investors and social entrepreneurs have been struggling for years to align on the right tools for measuring new-to-the world offerings. These offerings often take years to show results and many initiatives run the risk of stalling or failing due to lack of demonstrated progress. In addition, the evaluation of new solutions is often uncharted territory in terms of how to measure and what to measure. In this session aimed at funders and social entrepreneurs, IDEO, JD Power and Associates and Keystone will share their frameworks and experiences for creating a strategic measurement portfolio based on human centered measurement and evaluation methodologies. The session is part of a collaboration between IDEO and GOOD magazine to advance dialogue about evaluation in the social sector.

Findings

In standard capital markets, there are many ways to measure financial return on investment. A large portion of the SoCap09 conference was devoted to measuring or evaluating social benefits as well. This partnership effort is captured in part on a blog at www.good.is.

Beginning from the premise that the goal is to have positive social impact, what are the metrics that offer an unbiased result, and are coupled with both initial program design and refinement?

Panel members together offered a framework for evaluation:

1. Put people at the center of evaluation. This means both using feedback from people as a metric and putting a human face on the client, on who you are serving.

2. Take a systemic view. Put the “system in the room” to see unintended consequences, ripple effects, etc..

3. Navigate uncertainty. You never know what you are going to get; be prepared to learn through feedback.

4. Zoom out for a portfolio approach. Short term vs. long term impacts – choose evaluation that is appropriate.

5. Measure what you care about. You get what you measure. For example, the Kingdom of Bhutan has its Gross Happiness Index.

A systemic evaluation tells you what to measure; a portfolio tells you how to measure.

JD Powers Co. found that the best products were produced by assessing customer satisfaction. Higher quality products generate higher sales, as well as more satisfied customers and employees; this becomes woven into everything they do and builds their brand.

Whereas financial return is a relatively simple metric delivered primarily to the investors, continuous improvement measures are delivered first to practitioners, the shift is made from *proving* results to *improving* them. This is crucial for social investments. Evaluation tends to be compliant with the funder’s wishes; donors, funders, investors are the “keystone” species that drive the ecosystem. New metrics are instead fashioned first with customers and practitioners.

It is possible and desirable to engage all stakeholders in evaluation, including those to be affected by the intervention. Get feedback from all, then ask them to respond to what you have heard. Do anonymous aggregation and ask for response immediately, which produces surprise, delight and engagement.

In the social impact space, we are not asking strictly about customer satisfaction, since there are multiple customers. Two projects of IDEO are reducing "tween-age" obesity and reducing unwanted pregnancies. Standard customer satisfaction may not quite fit. Feedback data is not the same as measuring impact.

The presenters collectively posited a wheel-like framework for evaluation, in which the desired Impact is at the center, surrounded by Constituents, Society, Nature and Funders. Session-goers were invited to do a mapping exercise to identify the potential elements of each and how they interacted to produce consequences that impinged on other aspects of the framework, and intended as well as unintended consequences. Each part of the framework elicited multiple elements effecting it, in several directions.

Practical Implications, Originality/value: The framework provided a model for assessing the value of an investment beyond financial return, as well as serving to illustrate the multiple factors that interact in the real world beyond current economic models.

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